Accelerated Consumer Delegation Consent Quick Guide

Overview

The Delegation Tool provides a means for Enrollers (including Agency Managers 1 and 2) to delegate a Consumer's case to their Book of Business. Admin Staff also can use the Delegation Tool and delegate a Consumer's case to an Enroller's Book of Business on their behalf.

> **NOTE: Certified Enrollers are bound by Contract and/or State Regulations to only complete delegation requests at the express, present consent of a Consumer. Our system tracks and reports all Accelerated Delegation Requests made by every Certified Enroller, and suspicious use will be investigated. Certified Enrollers found fraudulently using this tool are at risk of having their Covered California certification revoked and their Book of Business permanently removed.**
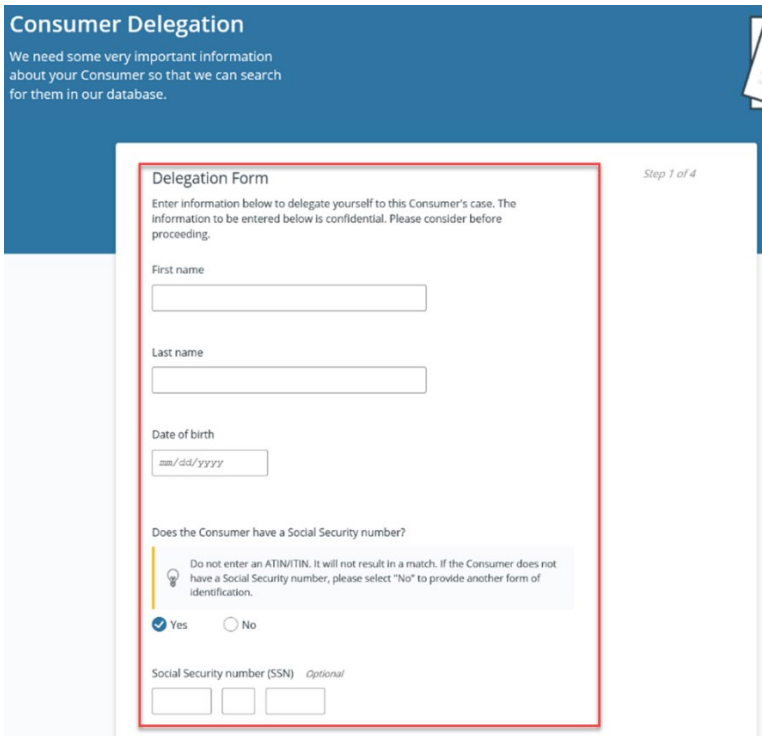
Steps

Enrollers can access the Delegation Tool link from the Quick Links section on their Enroller Portal.

1. Log in to the dashboard.
2. Select the **Delegation Tool** link from the Quick Links section on the righthand side of the page to display the Consumer Delegation page.
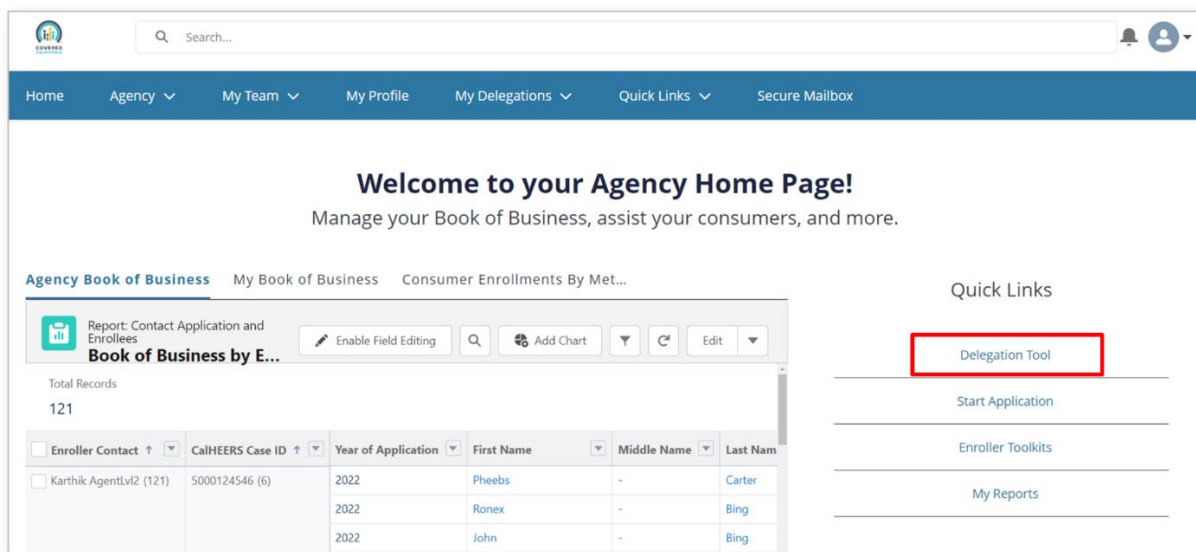
3. The user enters the following Consumer information on the Delegation Form:
   - First name
   - Last name
   - Date of birth

   Please note: An error message will display on the *Consumer Delegation* page if users enter a first name containing a hyphen. To proceed with the self-delegation, enter the first name with a space instead of a hyphen in the First Name field.

4. *Does the Consumer have a Social Security number?* field is optional and displays with a **Yes** and **No** radio button.

Yes	No
The radio button defaults to **Yes** and displays the SSN field. • Enter the number within the SSN field **Note**: An error message displays when the SSN is not a nine-digit number	Selecting the **No** radio button displays the following and requires at least one search criteria option: • "You must provide at least one of the following search criteria before you can proceed with delegation." • Search criteria options: **Home Address**, **Cell Phone Number**, or **Email Address**. An **Add** button displays next to each option. ○ Selecting an option dynamically displays a required entry filed ○ Selecting the Remove button removes the selected search option. **Note**: Searching by **Home Address** is recommended

5. Read all 4 statements out loud to the Consumer. Then, check the box next to each statement to indicate that the Consumer consents to allow the Enroller to act on their behalf.
   - An error message displays when a checkbox is unchecked
   - Selecting all the checkboxes enables the **Check for Consumer** button

   Note: Clicking the **Cancel** button navigates the Enroller to their respective dashboard.

6. Select the **Check for Consumer** button to initiate a search based on the criteria entered. The system conducts a match based on the information entered. One of the following displays:
   - *No Match Found* – No existing match found in the system

- *Multiple Matches Found* – Multiple matches found in the system

- *Match Already Delegated* – Match found and is currently delegated to the Enroller

- The *One Match Found* page displays when an exact match is found

7. **Authenticate the consumer on the One Match Found page (pictured above) by entering the consumer's cell phone in the cell phone number field.**

8. Check the **SMS Terms Of Service** checkbox to continue.

9. Select the **Send One Time Authentication Code** button. A code is sent to the cell phone number entered.

   - Up to three authentication codes can be requested. The user has three attempts to enter each code successfully.

   - A total of nine attempts with the incorrect code disables all fields except for the **Return to Enroller Dashboard** button.
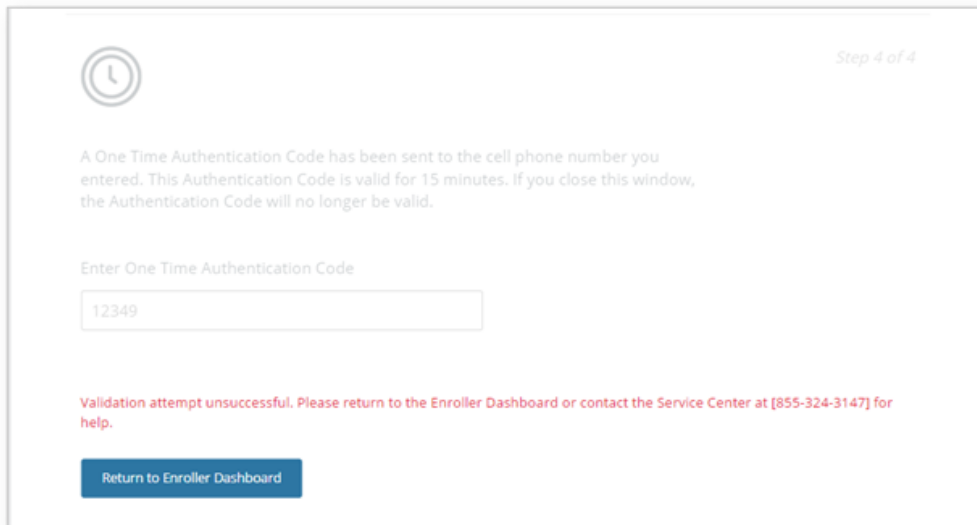
Note: The authentication code becomes invalid after 15 minutes, or when the page is closed. Selecting the **Cancel** button navigates the user to their respective dashboard.

In the event a consumer is not able to receive a text message with the One Time Passcode, the delegation option will need to be completed through a different method. The consumer can:

- **Log into CalHEERS and select Find Local Help**

- **Call the Service Center and authenticate themselves and agree to the delegation disclaimers**

10. Select the **Submit** button on the **One Match Found** page. One of the following popups displays:
    - The delegation process was successful – Consumer's case is successfully delegated
   - The delegation process was unsuccessful – Due to a system error
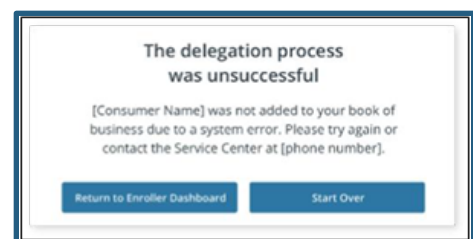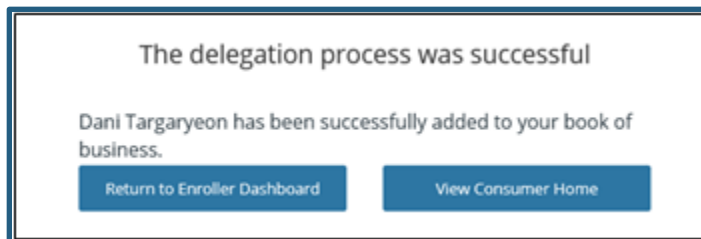
Approved Administrative Staff Level 1 and Level 2

Approved Admin Staff must first open the Agent's contact card and will locate the delegation tool in the quick links on that card. They can then proceed accessing the delegation tool and completing delegations using the same steps as outlined for the Agent above.
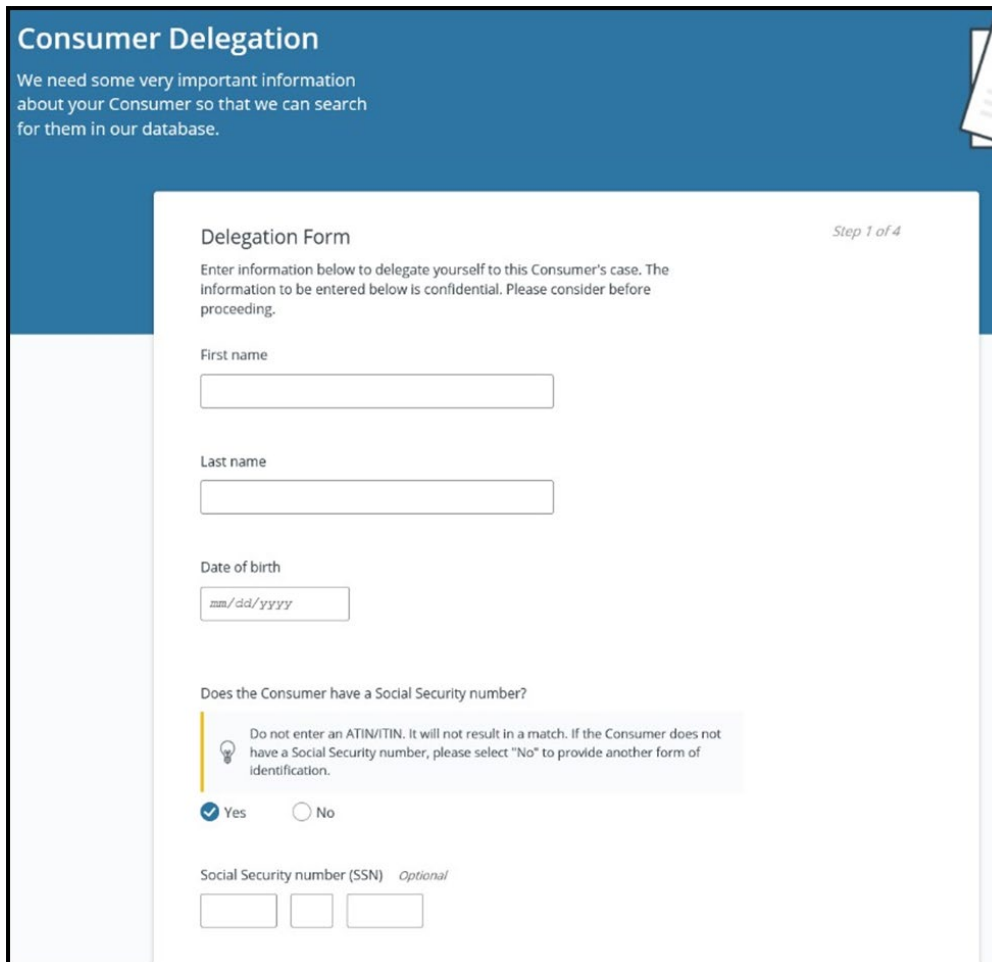
1. Select the **My Team** dropdown located on the top of the page.

2. Select **Team List**.
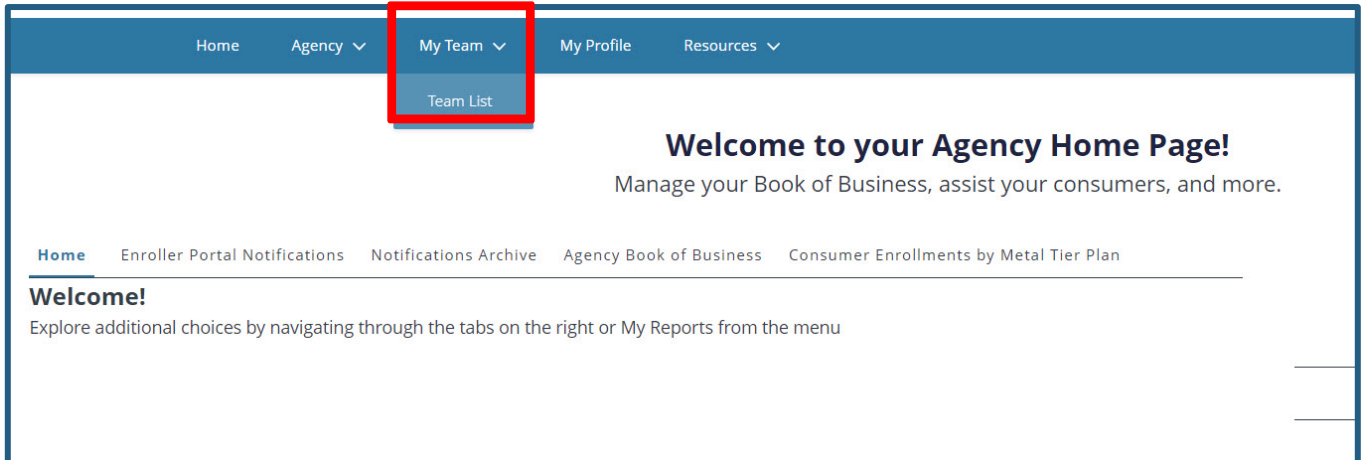
3. Click the hyperlink for the appropriate Agent. This will take you to the Enroller Profile page. From here, you can access the **Delegation Tool** located on the right-hand side of the page.

4. Fill out required fields to find the appropriate consumer.

Note: Delegation history will only display delegations that have ended. Enrollers should first be referred to accept the pending delegation in **My Pending Delegations** and then they can view the delegation in **My Active Delegations**. The following Consumer information displays:

- Household Primary – Name of the Primary Member of the Household

- Case ID – Household Case ID

- Delegation Start Date – Delegation start date

- Delegation End Date – Delegation end date

- Reason for End – Reason to end the delegation
    - Transfer within Agency/Entity
    - Consumer requested cancellation
    - Agent/CEC initiated de-delegation
    - Accelerated Consumer Delegation Consent
    - Agent/CEC certification ended